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ABSTRACT

This document brings together the fruits of the work that the Trenton, New Jersey school district did between 1970-73 to create a new system for administering innovation and assuming responsibility for the spending of millions of dollars in Federal grants. It contains material relevant to a school district looking to implement a project management system and has three parts. Part 1 is an overview of the principles and procedures of a project management system. It provides the foundation for understanding the Project Management Procedure Handbook which is Part 2. The handbook describes the various procedure that special projects in a school district should follow. Relevant procedures cover administration, finance, training, personnel, and evaluation. Part 3 of the document is a historical review of the project management system and its development. (Author/WH)

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PROJECT MANAGEMENT SYSTEM

by

David E. Weischadle, Ed. D.

Associate Professor of Education
Department of Educational Leadership
Montclair State College
Upper Montclair, N. J.

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C O N T E N T

Introduction

Part I. Overview of the Project
Management System (PMS)

Part II. Project Management (PM)
Procedures Handbook

Part III. History of the Project
Management System (PMS)
Development

INTRODUCTION

The 1960's brought many new ideas, concepts, and approaches to education. Some have lasted; others have not. Such innovations had one clear impact on educational administration: new approaches had to be developed to handle some new, non-traditional programs. Many districts, particularly those in urban settings which received large federal grants, responded by the establishment of new titles and positions, e.g. project director, project manager, and grants manager.

With the new titles came new responsibilities, totally different than those of the principal, supervisor, or assistant superintendent. Many project directors assumed major responsibilities for the spending of millions of dollars (e.g., Title I, ESSA). Such new responsibility as this one established a strong need for a new system to administer innovation.

This document brings together for the first time the fruits of the work conducted in one district (Trenton, New Jersey) between 1970-1973 to meet this need. In the March 1974 issue of Educational Technology Magazine, this author published "Project Management: A System to Administer Innovation." That article generated many letters requesting material. The "extra" copies I had of the material herein were exhausted quickly. I have sent copies throughout the United States, Canada, England, and West Germany.

Introduction (Continued)

Certainly the following material is far from being a "finished" effort. Indeed, a school district looking to implement a project management system would need to carefully sift through the material for what is useful to them.

Dr. David E. Weischadle

Upper Montclair, N. J.

January 1975

PART I

Overview of the Project
Management System
(PMS)

Innovation. Change. Experimentation. Creativity. These words are in constant use in education today. They are certainly ends and means which a clear majority of both professional and laymen alike are FOR.

And in the last ten years there certainly has seemed to be monies available from public and private sources to try something "new." But cynics all over the country ask "what happened to that new thing we tried in 1962? in 1966? in 1972?" So many innovations, experiments, or creative efforts have seemed to fade away without any effect.

Why? Well, of course, some projects are simply not innovative or experimental, and do not reap any change in schools. But many projects fail to achieve because they are mismanaged or not managed at all. At the federal level, such mismanagement came to public attention in the Congressional criticism aimed at the U. S. Office of Education.

At the local level, poor management of special projects (and the regular school programs as well) is much harder to detect. Indeed, many local projects tend to mistake activity with progress, involvement with achievement. Efforts to improve management of educational projects have indeed been sparse. One of the early pioneers in this field has been Desmond Cook, now director of the Education Project Management Center, Ohio State University.

His Education Project Management¹ is perhaps the best single source on how to initiate, conduct, evaluate, and terminate special projects. During the last three years, he has worked closely with Research for Better Schools, Philadelphia, toward the development of self-instructional text and cassettes.

But, like the projects Cook is dealing with, a project management system that is, an organized set of principles, procedures, and techniques, depends

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Desmond L. Cook, Education Project Management, (Columbus, Ohio: Charles E. Merrill Publishing Co.), 1971.

much on local development and management of its implementation. Perhaps the most effective way of discussing this vital aspect is to review how one district -- Trenton (NJ) Public Schools - developed such a system.

THE TASK DEFINED:

The city of Trenton, located midway between New York City and Philadelphia, consists of just over 100,000 residents. Trenton has all the typical urban problems associated with taxes, crime, housing, and education. Its school system, nearly seventy percent Black and Puerto Rican, operates some twenty-five special projects in addition to its regular school program.

These special projects, funded by the state and federal government, provide activities and services for the disadvantaged, the Spanish speaking, the handicapped, the dropouts, the adults, and the regular youngsters, i.e., elementary and secondary students. ESEA (Titles I, II, III, and VIII), NDEA III, EPDA, OEO, Model Cities, Urban Rural, Vocational-Technical Education Act, Adult Basic Education Act, supply anywhere from \$1,000 to \$1.9 million of funds for special projects, totaling totally \$5 million.

With just over 17,000 students, Trenton is typical of the medium size urban district in regard to the above funding pattern. As districts get larger, naturally the maze of special projects and funding sources get ever greater, and more unmanageable without some system of overseeing them.

In 1970, the district recognized that several things were happening. One was that it was getting difficult to maintain the projects under any single administrative umbrella. Projects affecting the elementary youngsters became the responsibility of those administrators. Adult education projects became responsible even to others. Only the superintendent had responsibility over all projects.

With the development of a new planning office,² the superintendent had the

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See David E. Weischadle, Building a Comprehensive Planning Capability Model with EPPBS, ERIC ED 057 457.

opportune organization to develop a project information system, standard policy procedures, uniform reporting schedules, and specific in-service training in educational management. These key elements were the basis for the development of a project management system within the Trenton School District.

PROJECT INFORMATION SYSTEM:

The basis of the entire project management system is the clear identification of projects and their objectives. With such information, the thrust and direction of projects can be compared with each other as well as with ongoing regular programs. Such a comparison insures a uniform approach toward district-wide goals and reduces internal competition for both youngsters and staff.

Information is also gathered on the audience, that is, at grade and age level as well as special characteristics (e.g. disadvantaged or physically handicapped). Such information provides planning data, particularly in terms of special populations omitted. New projects can therefore be designed to meet the needs of an audience previously ignored in planning special activities.

The information system also provides important analysis of total efforts. Particularly useful is the district's involvement in the completion of the Consolidated Program Information Report (CPIR), generally referred to as the Belmont Evaluation. This compilation provides the districts with a total overview of how federal dollars being received are invested in terms of student characteristics. Now in its third year, the district has some clear trending information in terms of federal revenues and costs.

PROCEDURES HANDBOOK:

In spite of over ten years experience with federal and state funding, the district had not formulated any special policy to cover project management. The staff used a combination of related board policy, state law requirement, and funding guidelines to operate their charges. However, special projects

brought to the districts some rather new activities: rented buildings, differentiated staffing, food services, contracted consultants, and evaluations/audits. Regular board policy would hardly be sufficient to handle the many unique and new operations.

Based on input from the various project directors, the planning office aimed toward writing a Procedures Handbook. Useful in its development was the Cook material as well as material developed by Research for Better Schools for Harrisburg, Pennsylvania. Resulting was a 35-page Handbook covering standard procedures in the area of personnel, organization, finance, information, evaluation, and training. Using a working draft, the project directors agreed to use the procedures on a pilot basis for one-year and then submit a revised draft to the Board for approval.

REPORTING PROCEDURES:

One of the earliest problems identified was in the area of reports. All projects had scheduled reports to advisory boards, funding agents, or other groups. However, no reporting system was established to inform the superintendent and other key administrators of the reports and their contents. Resulting was an information gap within the district. In fact, outside agencies were better informed of project activities than were senior administrators.

With the planning office as a monitoring agent, it was necessary to establish a reporting procedure that was informative and not bureaucratically large. A one-page summary sheet, to be completed quarterly, was designed with specific directions for distribution. Two recipients of the report were the superintendent and the planning office, with the latter maintaining a copy for the information file. Each project was also asked to file its proposal and a copy of any reports produced with the planning office.

These quarterly reports, and other documents, insure that information is

readily available for both planning and referrals. The central dispository makes a convenient and effective file to gain information which would otherwise be scattered through the district.

IN-SERVICE TRAINING:

A vital element of an effective Project Management System is trained personnel, in this case, the individual project directors. With assistance from Research for Better Schools and Ohio State, the district initiated training sessions for key administrators and project directors. This training provided each participant with essential skill management techniques such as PERT, GANNT, and Work Breakdown Structures. It was clearly shown that the success of an innovative educational activities was very much dependent on skillful project managers.

In the process of conducting these in-service meetings, the local planning office was gaining the expertise to maintain the initial training through periodical updates. Using the information system, the Handbook, and the reporting system, the local planning office can tailor future sessions toward the specific scope of the district's efforts. This capability enables the district to improve its current projects and, at the same time, prepare itself for future efforts.

THE KEY TO SUCCESS:

In spite of its successful development to date, the essence of its real success is commitment -- a commitment on the part of project directors and staff to improve the management of their special activities. With very limited resources, it appears that only the successful control of their use and productivity will lead to the achievement of our ultimate goal -- quality education for all youngsters.

Signs of commitment abound. We now need to insure that our commitment

remains channeled in the right direction to insure that Trenton youngsters reap all the benefits possible from our array of special projects.

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PART II

Project Management Procedures Handbook

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Setting

The Trenton Public School System, in the urban environment of the state capital, exists to serve the needs of over 17,000 students. The nineteen elementary, five junior high schools, and one senior high school contain a student enrollment drawn from a socially and economically varied population. Enrollment in the system is comprised according to the following percentages: Black - 69%; Spanish surnamed - 37%; and White - 24%. The grade structure of Trenton Public Schools follows the Pre-K - 6, 7 - 9, and 10 - 12 pattern.

Trenton, the fifth largest city in New Jersey, reflects many characteristics typical of the larger urban educational environment. Population by recent Census Bureau survey exceeds the 100,000 level (1970: 104,083). The population breakdown according to ethnic background is as follows: Black - 39,671; Spanish surnamed - 5,000; White - 59,305; and other - 107.

The population of Trenton, marked by a continued decrease in size, reflects mobility. As the population is marked with transitional and contracting characteristics, so is the city's economic profile. Over the past decade, while industry has moved out, a slow transition to a commercial and office employment economy has begun. This has altered the balance of needs which the Trenton Public School System must serve,

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particularly in the area of special services for youth from disadvantaged backgrounds.

The social and economic changes evolving in the Trenton Public School district require innovation and re-directing of educational resources. Also called for is the implementation of numerous special instructional programs to fulfill student needs. The management, operation, and evaluation of pilot projects necessitates the following Project Management Procedures Handbook.

The Trenton Public School's Project Management Procedures Handbook shall serve to define practices for planning, management, funding, staffing, and evaluation of projects functioning within the system.

The handbook shall be a guideline for ongoing operation and control of procedures under the Project Management System; it shall also provide a pattern according to which future projects may be designed, planned, and implemented.

The handbook sets forth methods of identification, involvement, and training of responsible individuals at all levels. The active participation and interaction of all personnel are concepts inherent in a Project Management System.

By following the guidelines of this handbook, all levels (the administration, project directors, and support personnel) have a standardized set of operating

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procedures reporting schedules, and feedback channels. Information and data necessary to facilitate decision making by project and upper level administrators shall be regularly available.

Objectives

Prime objectives for a Project Management System in the Trenton Public Schools are as follows:

1. to develop an approach to the effective execution of projects in the school system
2. to provide the Office of the Superintendent with a constant and up-to-date source of information on each project within the system
3. to establish a means of identifying management problems in terms of time, cost, and performance, as well as on the operational level
4. to isolate and to make clear, at an advance stage, management problems which may adversely affect projects
5. to provide for a detailed and indepth exchange of technique and data, not only among the various projects within the city, but between and among outside districts
6. to establish models in these areas:
 - a. collection, reporting, processing, and evaluation data;
 - b. planning of time, cost, and performance;
 - c. administering and decision making;
 - d. execution of the assigned responsibility of the School Board, the Superintendent,

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and all other district branches.

Benefits

A Project Management System will provide:

1. the Superintendent, the Board of Education, and staff members with information for decision making
2. a means for efficient allocation of resources
3. an integrating mechanism, for input, from community, local agencies, students, and instructional staff toward implementation of decisions regarding educational priorities
4. functional gauges of the impact of projected projects.

II Organization of Project Management System in Trenton Public School System

Organizational Structure

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Projects created within the system are organized so that they functionally complement the current administrative responsibility of senior personnel. Hence projects serving general elementary and secondary youngsters are responsible to the Office of the Assistant Superintendent for Curriculum and Instruction; projects aimed at the needs of adult students are the responsibility of the Office of the Assistant to the Superintendent for Administration.

This relationship is described in more detail in the graphic appearing on the next page in the summary which follows.

Definition of Responsibility

Board of Education

The responsibility for the adoption of operating policies growing out of recommendations of the Superintendent of Schools, including the approval of the Project Management Handbook, rests with the Board of Education.

The Superintendent of Schools

The Office of the Superintendent carries the overall responsibility for the ongoing operation and administration of the Trenton Public School System. In this role, he is assisted by:

1. the Assistant Superintendent for Curriculum and Instruction

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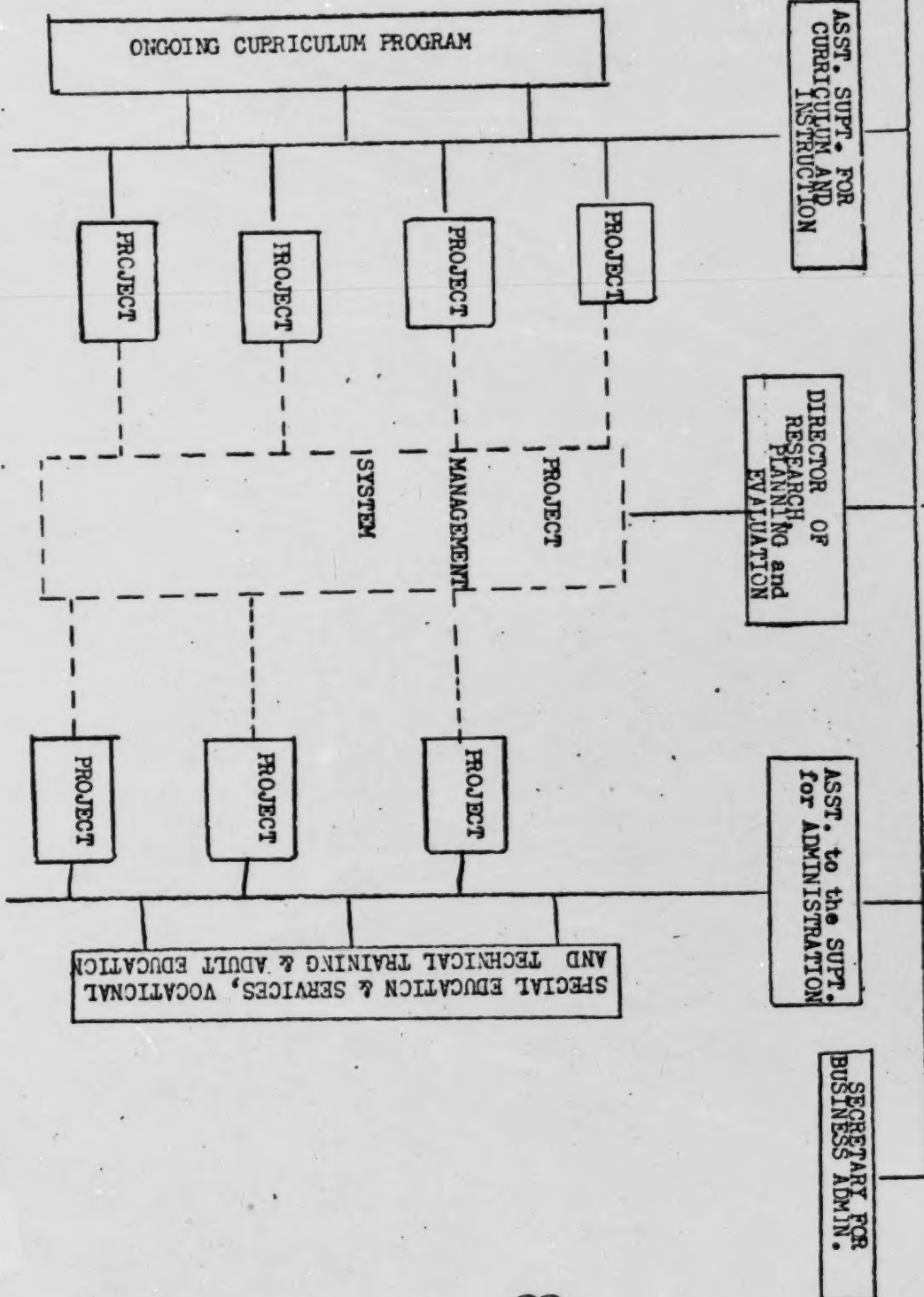
ASST. SUPT. FOR
CURRICULUM AND
INSTRUCTION

DIRECTOR OF
RESEARCH
PLANNING and
EVALUATION

ASST. to the Supt.
for ADMINISTRATION

SECRETARY FOR
BUSINESS ADMIN.

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ORGANIZATION STRUCTURE for PROJECT MANAGEMENT SYSTEM -- TRENTON PUBLIC SCHOOLS

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2. the Assistant Superintendent for Personnel
3. the Assistant to the Superintendent for Administration
4. Secretary For Business Administration
5. Director of Research, Planning, and Evaluation

The Assistant Superintendent for Curriculum and Instruction

This office bears responsibility for integration of projects into the regular Pre-K through 12 grade programs. This includes the development, implementation, operation, and control of project elements.

The Assistant to the Superintendent for Administration

This office carries the responsibility for integration of projects into regular programs within the three areas, Special Education, Vocational Training, and Adult Education. He, also, shall be responsible for development, implementation, operation, and for control of project elements.

The Assistant Superintendent for Personnel

The responsibility for approving, & hiring personnel and other personnel-related action involving project employees rests in this office.

1. Project support personnel, whatever their capacity and regardless of funding source, or job status, are considered to be Board of Education employees, and are subject to all regulations of employment.

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2. All employment procedures, staffing guidelines, and requirements, established by the Office of Personnel shall be observed by Project Directors as they fill positions arising within their programs. All deviations from normal policy must be cleared through this office; and all hiring shall be acknowledged as conditional pending approval by the Board of Education.

The Secretary for Business Administration

The Secretary is responsible for approving and/or providing for all business and business related transactions carried out for all projects within the Trenton Public School System.

The Director of Research,
Planning, & Evaluation

The Division is responsible for the operation of the Project Management System. This includes monitoring the planning, operation, and evaluation of projects, with particular emphasis on providing the requisite technical assistance, and providing in-service training for supportive personnel

The Project Directors

Each Project Director shall be responsible for managing his project, including the phases of planning, implementation, evaluation, and control.

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1. Each Project Director must maintain a current listing of support personnel in all positions; such listings shall be updated each time changes occur, and shall be sent to the Personnel and Payroll Offices.
2. Each Director shall keep a current personnel file on support people, such a file shall consist at minimum of:
 - a. Name
 - b. Address
 - c. Telephone number
 - d. Social Security number
 - e. Job title & Salary
 - f. Job status
 - g. Effective date of Contract
3. Further, a Project Organization Chart showing all authorized and budgeted positions, title, and name of jobholder (jobs not currently filled should be shown, but designated vacant). Three copies of this chart shall be made and kept on file accordingly:
 - a. One to be posted in the Project Office
 - b. One filed with Office of Personnel
 - c. One filed with the Director of Research, Planning, and Evaluation.
4. It shall be the responsibility of each Project Director, consistent with Board of Education policy of involving community elements in the educational planning procedure, to establish for

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each project an Advisory Council.

a. Such Councils shall follow a model (depending on the nature of the project): as outlined below:

1. Where projects are of limited scope or based on the particular needs of one school, such Council shall consist of Parent/Teacher/Students
2. Where projects are systemwide in scope such Council shall incorporate community leaders, Professional staff elements, as well as the above membership.

5. In an overview, the Project Directors shall

- a. Supervise project personnel
- b. Provide In-service training related to projects
- c. Motivate and direct support personnel
- d. Report to and from all appropriate levels
- e. Delineate clear lines of responsibility to project support personnel

III Project Organization

Sources of Projects

The individual school initiates a project idea with a view to meeting particular needs identified as warranting special attention, or;

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The District organization calls for a project aimed at certain goals and objectives identified by/or to the Superintendent of Schools.

Preparation

Project Preparation Guidelines include four basic project phases: planning, implementation, control, and termination.

1. Planning - the development of an initial set of decisions about the allocation of resources to a course of action in order to achieve desired ends. This stage consists of the preparation of a preliminary Prospectus and upon its approval, a Proposal.

a. Prospectus

1. Function - to provide a structural vehicle to prepare and to present a refined idea of a project, or set of related activities, for the consideration of the Superintendent and decision making personnel.
2. Content Elements -
 - a. Setting, a description of the situation
 - b. Problem, - what is to be considered for achievement stated in terms of an "end result" or "output"

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- c. Course of action - tentative set of activities which will lead to the solution of the problem
 - d. Resources - what will be necessary to achieve the solution (a generalized budget)
3. Procedure for preparation of a Prospectus
- a. not to exceed five typed pages.
 - b. title page required.
 - c. submitted to Director of Research, Planning, and Evaluation with three copies.
 - d. submission at any time.
 - e. reviewed by Director of Research, Planning, and Evaluation and the Superintendent.
 - f. upon positive recommendation prospectus may be developed into a fundable proposal.
- b. Proposal/Initial Plan - This will provide a plan for a set of activities directed toward achievement of established objectives with specified resources set forth in a logical, rational, systematic, and justifiable manner.
- 1. Content Elements: the content of a proposal will vary depending upon funding source, but a general set

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of elements are presented for guidance.

- a. situation - a description of the problem setting
 - b. statement of the problem
 - c. rationale of the project
 - d. review of selected literature pertinent to the project
 - e. statement of goals and objectives
 - f. indication of procedures to be followed in the project
 - g. schedule
 - h. resources required
 - i. evaluation plan
 - j. dissemination plan
 - k. budget documentation
 - l. appendices
2. Procedure for submission of plan for approval and activation
 - a. prerequisite - prospectus approval and activation
 - b. incorporation of Project Management Components
 - c. title page and abstract required
 - d. submitted to Director of Research, Planning, and Evaluation and appropriate Assistant Superintendents
 - e. duplicate copies as required by funding agency
 - f. preliminary review of proposals by Director of Research, Planning, and Evaluation prior to submission to appropriate Assistant Superintendents

- g. submission period as indicated by funding agency

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- 2. Implementation: The implementation of a project includes its organization and preparation (or gear-up). These stages must be planned and the particulars of each stage included by the Project Director in the project proposal. These specifications are then established and approved by the Department of Research, Planning, and Evaluation and are used during the project.

- a. Organization

- 1. Staffing: statements must be provided concerning the following problems in staffing the project:

- a. sources of personnel
- b. general description of staffing by position, including qualifications of each position
- c. hiring practices
- d. policy concerning transfer or re-assignment of staff within the school system
- e. pay and benefit guidelines

- 2. Project Placement: guidelines must be clearly stated concerning:

- a. alternative project placements within the school organization
- b. constraints on project (school policy, legal restrictions and ordinances, etc.)
- c. advantages of placement
- d. criteria for placement decision

- b. Preparation (or "gear-up"): the process of operationalizing the project

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1. Physical Set-up: clear statements answering the questions "who, when, where, why, what, and how" must be prepared in regards to Facilities, Supplies, Materials, and Equipment, concerning the following areas of use:
 - a. general policy and source of control authority
 - b. methods for procurement
 - c. maintenance procedure
 - d. usage
 - e. eventual disposition
2. Management Information System: policy statements must be included in this section providing definitive information concerning:
 - a. available hardware and software
 - b. available services
 - c. process of utilization of these commodities
 - d. requirements for their usage (in terms of time, cost, etc.)
 - e. extent of capability
3. Control: the ongoing process of determining, at established intervals, deviations between planned progress and actual status of a project; and of identifying and applying necessary corrective actions.
 - a. Reporting: The procedures for supplying the Director of Research, Planning, and Evaluation with necessary information is described under "Communication by Project Directors".
 - b. Problem Solving: The Project Director has the

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responsibility for the determination of the cause/effect source of problems of control, and the decision on corrective action relevant to his project.

- c. Decision Implementation: the Project Director shall implement those decisions generated through this process, revising his actions on the basis of monitored supervision of the correct action within the continuing project activities.

4. Termination

a. Forms of Project Termination

1. Completion - the activities of the project are terminated and will no longer be in operation. Upon completion the project will cease to exist.
2. Selected Integration - related parts or activities of a completed project are to be integrated into the ongoing school program.
3. Installation - the completed project will be incorporated in its total form into the ongoing school system.

b. Procedures for Terminating a Project

1. Policy on Facilities, Materials, and Equipment Disposition

- a. here must be stated the definitive policy concerning conversion of the physical components of a project

into the ongoing school program.

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2. Preparation of Project Documentation -
the following documents must be submitted
to the Director of Planning, Research,
and Evaluation upon termination of a
project:

- a. Final Project Report:
- b. Project History Report

Internal Communication

The internal communication system of the Trenton Public Schools Project Management System is designed to gather and disseminate pertinent information on project status to all levels of the district organization. Prompt and accurate flow of information and ideas throughout the system is crucial.

Information needs of the Office of Research, Planning, and Evaluation. The Director of Research, Planning, and Evaluation will receive monthly reports from the Project Directors so that his office can monitor the status of the current projects on a frequent basis.

Communications from Director of Research, Planning, and Evaluation. Reports submitted by Project Directors are evaluated and summarized by the Director of Research, Planning, and Evaluation, who in turn, submits them to the following people:

1. Assistant Superintendent for Curriculum and Instruction and Assistant to the Superintendent for Administration on a monthly basis
2. The Superintendent on a monthly basis

The report of the Director of Research, Planning, and Evaluation will cover the highlights of projects problems and review request for change in planning, scheduling, or funding. The results of these reviews are sent back to the Project Directors

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by the Director of Research, Planning, and Evaluation advising them of the results of the reviews.

Communications by Project Directors

The Project Director will submit to the Director of Research, Planning, and Evaluation the following reports: Meeting Reports, Monthly Progress Milestone Completion Reports, Final Project Reports, Project History Reports.

1. Preparation for and Reports of Meetings.

- a. In order to expedite time, an agenda will be prepared prior to each meeting.
- b. A copy of the agenda will be received by participants 3 days prior to the scheduled meeting.
- c. Each project will meet frequently to plan and execute project activities.
- d. The time and location of meetings shall be identified by the Project Directors.
- e. Project Directors may schedule meetings and/or conferences at such a frequency and with such members of his staff as he may determine to be necessary.

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- f. The Assistant Superintendent for Curriculum and Instruction and the Assistant to the Superintendent for Administration and the Director of Research, Planning, and Evaluation will meet on a monthly basis; and jointly shall meet with Project Directors on a quarterly basis.
- g. Minutes of all meetings related to the project should be recorded.
- h. A copy of project meeting minutes should be submitted to those present (by the person recording them), to the Project Director and to the Director of Research, Planning, and Evaluation with the right to be disseminated.

2. Monthly Progress Reports

Generally, these reports will cover the Managerial and Financial aspects of the project and provide a discussion of work planned and accomplished. This report will contain the following sections:

- a. Work Performed - this section should describe the overall progress made during the monthly reporting period, and should include: all work performed for the reporting period (technical and organizational devel-

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opments); positive and negative results; technical and administrative recommendations; conclusions, both favorable and unfavorable.

- b. Current Work and Performance Problems - this section should contain statements of progress with planned work. It should indicate current or anticipated problems that may impede performance. Finally, it should include proposed corrective actions, if necessary.
- c. Work Planned - this section should indicate the work scheduled for the next monthly reporting period. It should include an updated version of the time-phase plan for significant deviations from previous versions.
- d. Resource Utilization and Cost - this section should describe the manpower, supplies, and other resources utilized during the reporting period and their associated costs.

3. Milestone Completion Report

This report is due as each of the Milestones of a project is completed. The report will document in detail the analysis, interpretations, recommendations,

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and conclusions with respect to work performed for each Milestone. It should include tables, diagrams, sketches, and other information in sufficient detail to explain comprehensively the results of each Milestone, as well as an explanation of deviation from the time, cost, and performance goals set forth in the project plan.

4. Final Project Report

The Final Project Report will focus on the project as a whole, and will address the project over its entire period of operational activity. It should be an overview and summary of the entire project, the Milestones and tasks and other aspects of the project as are necessary for complete understanding. The report should include a discussion on the following topics, as well as others pertinent to the evaluation of the completed project:

- a. Goals and objectives of the project;
- b. The final product resulting from the project, with its specifications;
- c. Milestones and tasks completed under this project;
- d. Findings and Conclusions;
- e. Summary of Project Costs.

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5. Project History Report

The Project History Report will include:

- a. Funding of project;
- b. Planning of project;
- c. Activity-by-activity account of progress, including deviations and corrective actions;
- d. Final product analysis and evaluation;
- e. Other pertinent material.

Information Center

1. Documentation

a. A copy of all significant project memos, letters, reports, meetings, and pertinent project correspondence will be kept by the Project Director in a Project Handbook.

b. Two copies of all these documents will be sent to the Director of Research, Planning, and Evaluation by each Project Director so that a copy is filed in the Information Center, and the other retained by the Director to serve as a "working copy" to be used at his discretion.

2. Information Center of the Division of Research, Planning, and Evaluation.

a. The main purpose of this center is to centralize control of all documents

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except those of only momentary significance. Project record keeping would be impossible if the Director of Research, Planning, and Evaluation had to rely on functional groups' files. A copy of all memos, letters, reports, photographs, and other pertinent documents will be sent by the Project Director to the Director of Research, Planning, and Evaluation and filed there.

b. The information center performs several related administrative services such as "loaning" documents through the medium of providing duplicate copies, and distributing documents (for example, internal distribution of reports). Another important function of the record center is the preparation and distribution of reports. The distribution of reports enables project personnel to be aware of documents pertinent to their project.

3. External Communications

a. External Communications encompasses many inquiries, correspondence, and publicity releases that are outside of the Trenton Public School System or Project Management System. The following should be considered external communications:

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1. Communication with other school districts.
 2. Communication with State agencies.
 3. Communication with Federal agencies.
 4. Communication with parents.
- b. Responsibility for External Communications

1. All external correspondence must be approved by the appropriate Assistant Superintendent.

2. Copies of inquiries and communications from other districts or agencies must be directed to the Information Center of the Division of Research, Planning, and Evaluation.

3. Press releases and other publicity must be submitted to the appropriate Assistant Superintendents for approval prior to their release.

4. Communications with students and parents should be handled by the Project Director with a copy sent to the Assistant Superintendents.

5. Communication with Government agencies should be handled with the Director of Research, Planning, and Evaluation and the Assistant Superintendents, and the Superintendent of Schools.

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6. Attendance at workshops, conferences, seminars, etc. shall be approved by the Assistant Superintendent for Curriculum and Instruction or for Administration.

c. Contractor and Sub-Contractor Communications

1. The Project Director and the Business Office approve specifications for all service contracts.
2. All meetings dealings with service contracts will be scheduled by the Project Director and the Business Manager.
3. The Business Manager will in turn work with the Project Directors and the Director of Research, Planning, and Evaluation to clarify steps to be taken in dealing with specification of service contracts.

Travel

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Travel within and outside of the Trenton School District is permitted and desired, when such travel will aid, in a direct manner, the quality of the educational offering to the children of our school district. Approved travel includes, but is not limited to, mileage accumulated in the everyday management of a project, visits to other school districts and/or projects and attendance at approved workshops, seminars, and conventions.

1. Budget Obligation

- ✓ a. Project Directors must include in their budget funds the following categories, if they intend to apply for travel reimbursement:

1. Mileage within the district;
2. Funds for travel outside the district, meals, lodging, travel per diem salaries, funds for substitute;
3. Reimbursement for travel will be approved only if a provision has been made to that effect in the budget and is awarded only to that extent of such commitment
4. No travel reimbursement will be approved unless proper receipts are presented

2. Approval

- a. All travel must be approved by the

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applicant's immediate superior.

3. Travel Within The School District

a. All project Directors, co-ordinators, supervisors, and other project personnel, who must travel within the school district in order to accomplish their assignments will be reimbursed at the rate of \$.12 per/mile traveled, provided:

1. They have been approved for such travel by the Board of Education. A list of such personnel shall be provided to the appropriate Assistant Superintendent for his approval.
2. A certificate of automobile liability coverage shall be required from the insurance company for each person approved for mileage. This certificate shall be kept on file in the Office of the Business Manager.
3. A mileage report of privately owned automobiles used for official business shall be sent by each claimant at the end of each month to the Business Office. The report shall state the date destination, and miles

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traveled for each claimed mileage expense. A requisition in the amount of expense claimed shall accompany the report.

b. Included Travel - Travel covered by this form includes travel between school district buildings, travel for petty cash purchases of supplies, approved school meetings and conferences, training, and other travel incidental to the every day project management. Since many project directors and/or personnel occasionally expend personal time weekends, evenings, and non-school days in business related to their projects, mileage accumulated in these pursuits may also be claimed if accompanied by an explanation on the back of the mileage form.

c. Transporting Students - Personnel transporting students for any reason should have on file a certificate of automobile liability. Only automobiles listed on the certificate should be used to transport students.

4. Travel Outside The District

a. Prior approval both of the Director of the Project to which an applicant is assigned and of the appropriate Assistant Superintendent must be secured for travel outside of the school district if such travel is to be on school

time and/or expenses reimbursed by the school district.

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1. Application shall be made at least two weeks prior to such travel.
2. Request for time away from work in duplicate shall be made. The appropriate Assistant Superintendent will sign the request using the following guidelines:
 - a. If reimbursement of expenses is requested, it will be submitted to the Business Office where the usual purchasing procedure is followed. The receiving report copy of a purchase order will be forwarded to the individual when funds have been approved.
 - b. If no reimbursement is requested the Business Office will notify the individual that the request has been approved.
3. Upon approval of the applicant's request the Business Office will advance 90% of the approved expenditures requested to cover the expense of the trip.
 - b. Reimbursement - After the event has taken place, the originator will submit a completed "Request For Reimbursement" form, attaching the receiving report

of the Purchase Order and receipted bills for hotel stay, public transportation charges, registration fees, tolls, etc.

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1. If any individual does not incur the expenses as approved, he should indicate by stating "No Reimbursement Required" on the receiving report, and return it to the Business Office for clearing.
- c. All expenses incurred while on official business are tax exempt, and therefore, no reimbursement can be made for such taxes paid in error.
- d. No expenses can be charged to the Trenton Public Schools.
- e. If expenses exceeded the 90% advanced, the balance will be paid upon approval of the claim.
- f. If expenses did not equal the amount advanced, the balance of funds not used will accompany the final statement of expenses and will be credited to the account indebted for the trip.

5. Travel Included

Application for travel outside the school district can include, but is not limited to, visits to other school districts and/or projects, attendance at workshops, seminars and conventions, and any other business related to the project to which an individual is assigned.

6. Directors and Personnel Acting as Resources to Programs Outside the Trenton Public School System

- a. Project Directors and/or personnel may apply for time away from work to the appropriate

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Assistant Superintendent to act as a Resource to other school districts and/or agencies in his field of specialization.

b. If approved, the applicant shall forego the per diem salary for the days leave as granted.

c. Leave for such consulting purposes shall not exceed five days.

d. If the applicant has accumulated unused vacation time, leave may be granted without loss of salary, and the time away from work shall be charged to the accumulated vacation time.

e. Any financial arrangement between any person on consultant leave and other school districts and/or agencies to which they are acting as a consultant are strictly the business of the parties involved and bear no relationship to the individual's contact with the Trenton Public School System.

7. Compensation For Non-School Time

Approved travel for the expressed purposes of improving the quality of education in Trenton (with the exception of Resource leave) shall include full pay for the days granted away from work. When such travel extends into non-working days, such as weekends, the school district shall pay the person a salary equal to the per diem rate of salary for his job classification for the days not included in the person's regular work schedule, but for which they have been given approval to attend an activity.

Finance

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The Business Office shall be responsible for instructing, demonstrating, and disseminating to Project Directors and project support personnel the financial forms used by the projects. That office shall be responsible to see that these forms maintain compliance with the requirements of the funding source guidelines.

1. Budgets

- a. Preliminary budgets shall be established by the Project Director for each expense account number after approval of the Business Office.
- b. Final Project operating budgets will be determined after approval of the Office of the Superintendent, the Assistant Superintendents, and the Director of Research, Planning, and Evaluation, and the funding source.
- c. No items are to be purchased without securing a purchase order number from the Business Manager. Failure to follow the procedure shall place the responsibility for payment upon the individual who ordered the item(s). All existing school district requirements for purchases must be followed.

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2. Undistributed Budget - Planning Reserve

a. All funds remaining in the salary accounts after employee salaries have been determined shall revert to the Office of the Assistant Superintendent in charge to be placed in his reserve account. (This regulation is effective only if applicable).

b. Funds remaining in all other account numbers after the guidelines termination dates, shall revert to the Business Office.

3. Transfer of Funds

No transfers shall be made without the approval of the Business Office. This procedure is necessary to guarantee the financial compliance with the approved budget. Budget transfers are to be requested in writing by the Project Director to the Assistant Superintendent in order to determine if the project's focus is affected. Transfers will be processed by the Business Office and all documentation surrounding the transfer will be retained by him with copies submitted to the appropriate school district department.

4. Expenditures - (see chart following page)

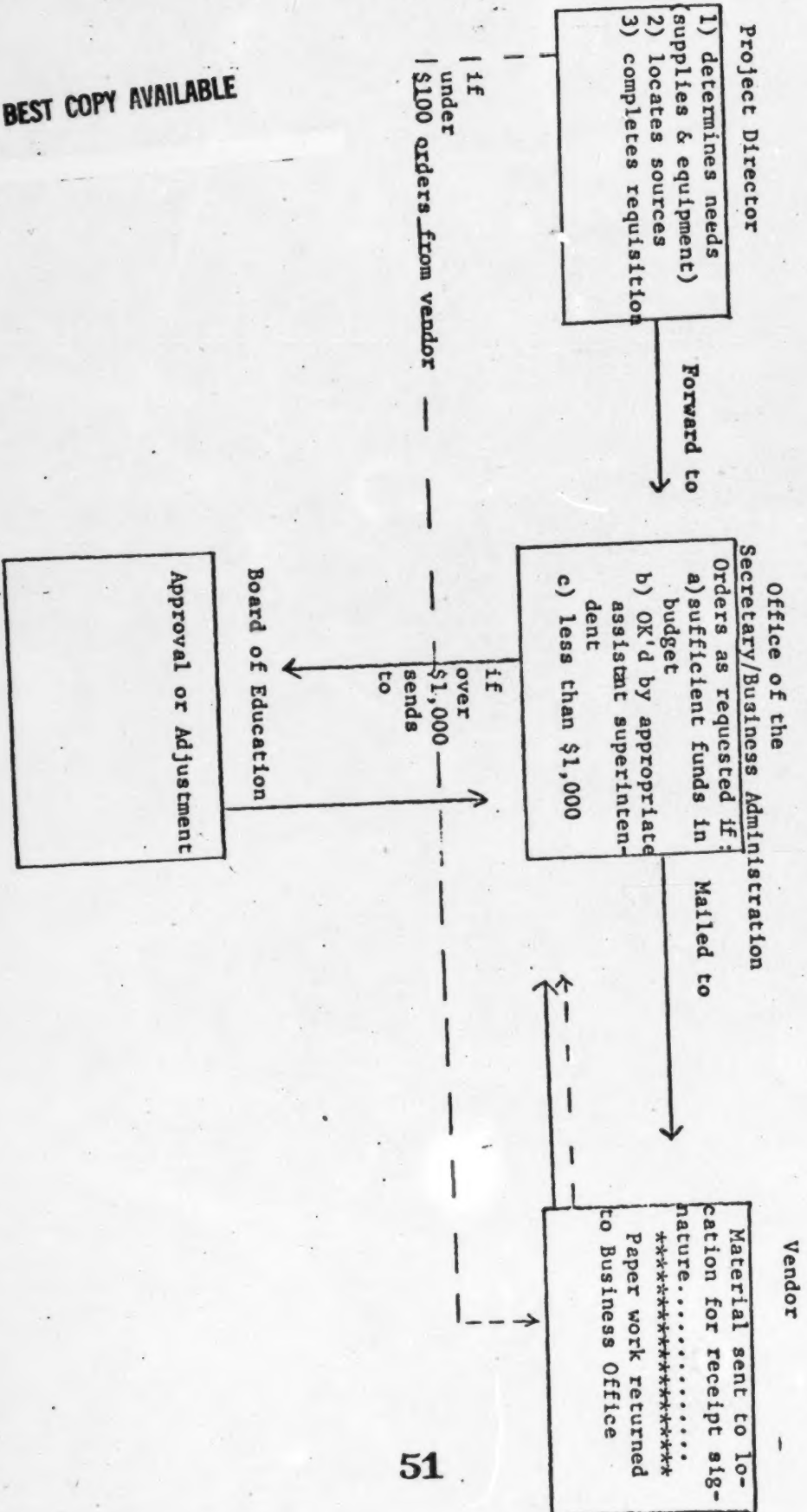
All requisitions shall be coded and processed by the Business Manager.

a. Items under \$100 may be ordered without competitive bidding, while items

PURCHASE PROCEDURES

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(Requisition forms----- BS 5, Books & Subscriptions; BS 9, Equipment & Supplies.)



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above \$100 but less than \$1000 must be bid. Items over \$1000 must have Board of Education approval.

5. Examination Copies and Material

All items requested by a Project Director for examination must be processed by the regular requisition procedure. Costs for the items and/or return postage will be the responsibility of the individual ordering such items.

6. Reporting on Participants

Project guidelines for student participation are an integral part of the financial structure. Project Directors are requested to collect this data on a continuous basis. Attendance indicators for students will also be requested. These will be sent to the Director of Research, Planning, and Evaluation.

7. Equipment

Equipment requested for a project shall be purchased according to the funding source guidelines and the purchasing procedures of the school district. Items shall be delivered to the storeroom where the serial numbers will be recorded and ownership clearly marked.

The storeroom will not mark items prior to written approval and acceptance of the

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of the items from the Project Director. Each Project Director shall provide funds in the budget to maintain project equipment (Movie projector, slide projector, etc.).

8. Inventory

Each Project Director shall maintain a complete inventory at all times.

Items that are considered consumable shall be inventoried at the time of delivery and at the close of the project, since future project budgets can be affected by the amount of items in inventory.

9. Supplies Accountability

Each Project Director is responsible to maintain the final copy of the distribution form for all project materials and equipment. This copy must show the signature of the person for whom the items were designated. (Procedures for this portion are being developed and will be included in this section upon completion).

VII Evaluation

Functions

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The functions of Project Management Evaluation are: 1) to provide selected information for decision-making relative to the operation of the Project Management System; 2) to provide feedback information for project modification; and 3) to provide a basis for departmental reports.

1. Evaluation is a process which;
 - a. is continuous and an inherent part of all Project Management System activities.
 - b. identifies essential pieces of information required for current decision-making, reporting, and future planning.
 - c. employs original sources of required information before using secondary sources (goes back to original data).
 - d. collects information necessary to deal with the requirements of good communication.
 - e. has a systematic formal reporting procedure.
 - f. analyzes information according to checklists of questions presented in the evaluation scheme which must be answered.
 - g. reports selected information to designated persons in the prescribed form with the essential content, at the necessary time, and as prescribed in the evaluation scheme and schedule.

2. Targets for evaluation

a. Project Evaluation

1. Are performance objectives efficiently and effectively being accomplished?
2. What is relationship of Time and Cost to attainment of project goals?
3. Definitions -

- a. Effective: in terms of measured changed performance level per child
- b. Efficient: In terms' of space, time, and energy allocated per unit of performance gain.

Unit of Performance Gain to be determined for each project plan

b. Project Management System Evaluation

1. Are the organization, procedures, activities, and information system of the current Project Management System effective and efficient?
2. Definitions -
 - a. Effective: In our PMS, are we doing the right things?
 - b. Efficient: In our PMS, is what we are doing, done well?

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c. Project Management System Personnel

The Project Directors shall recommend to their superior administrators any changes in project work assignment, after assessing these questions: Are the right people in the right job; are they fulfilling their duties and responsibilities; and does a positive human climate exist in the Project Management System?

d. Evaluation Scheme

The required elements of data employed in the evaluation scheme will result from an analysis of completed and ongoing project reports as they relate to the following check lists of questions:

1. For Project Evaluation -

(Evaluation programs should be planned which will provide the feedback information to answer such questions as;

a. What should be taught to whom?

For what ages is this concept appropriate?

b. What materials should be used in instruction of which children?

What are the essential characteristics of materials to be used by children and teachers in this project?

c. What learning strategies are most effective for which children? What techniques and groupings are most

effective and least effective for

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these kinds of children?

- d. What standards should be used in determining successful accomplishment? Does the standard used indicate the degree of attainment of each learner?
 - e. Which objectives of learning are capable of evaluation and attainment? Is the stated goal a possibility for this kind of child?
 - f. What are the learning products we can expect these children to gain? What are the cognitive domain products? What are the affective domain products?
2. The decision, as to what should be included in the school program and what should be excluded, should be closely related to the analysis of student needs and evaluation of completed projects.
 3. A clear statement of the objectives of the school and of criteria for establishing priorities should give direction to all evaluation and curriculum planning. This applies to all changes in emphasis or in direction in all fields of study. Decisions about when to teach what should be based on the relative importance of alternative ways of using the learner's time at any given level as well as the learner's ability to understand at any given point in his school experience.
 4. For Project Management System Evaluation:
 - a) Are planned schedules maintained?

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- b) Are expenditures as budgeted?
- c) Are output specifications being met?
- d) Are resources adequate and used properly?
- e) Is information flow and content as needed?
- f) Are the right people in the right job with adequate training?
- g) Does a healthy human environment exist with positive interaction and high morale?
- h) Are contractual agreements met with satisfaction?
- i) Are desired changes resulting from the operation of Project Management System?
- j) Are Project Management System activities meeting local school system needs and objectives?
- k) Are Project Management System activities consistent with Board policies?
- l) Do Project Management System activities conform with legal requirements?

6. Kinds of Data Collected for Evaluation

- a) Time
- b) Cost
- c) Performance
- d) Resource Utilization
- e) Communication
- f) Staffing
- g) Human Relations
- h) Impact
- i) Significance
- j) Board of Education governing policies.
- k) Local and State rules and regulations.

7. Unit of Performance Gain

Some unit measure of performance gain shall be an essential part of each project proposal. It shall reflect the average per pupil change in specific performance objectives.

e. Evaluation Schedule

Evaluation activities will conform to the following schedule based upon the factors required in the evaluation scheme.

LEVELS OF MANAGEMENT

FREQUENCY

Project Directors

Monthly

Report shared with the
Office of the Assistant
Superintendent for
Curriculum and Instruction,

Monthly

the Assistant to the Superintendent
for Administration, and with
the Division of Research, Planning,
and Evaluation

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The Superintendent

Monthly

The Board of Education

Quarterly

Analysis, synthesis, and aggregation of information occurs at each level, insuring the representation of the total picture of the Project Management System and its projects.

A feedback flow in these reports will be established as the higher levels of management and responsibility direct their respective reactions to the regular reports. This feedback is expected to be presented in written fashion, where necessary detailing pertinent factors.

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The function of training programs is to assist and to provide Project Management System personnel with the appropriate training which will develop, maintain, and expand the project management competencies of each member. Such method for providing continuing growth in the system is essential to the attainment of Project Management System objectives.

1. Training Program Components

- a. Orientation Conference -- to provide basic information and orientation to the Project Management System with emphasis upon the need for justification and explanation of the system, its operation, its outcomes, and its organization. All newly assigned personnel will participate in the conference every three years of service and within six months of entry on administrative position with the school system.
- b. Basic Management Skills Workshop -- to provide basic management knowledge skills and attitudes required to function in the Project Management System and to comply actively with assigned duties and responsibilities. All newly assigned personnel will participate in the Basic Management Skills Workshop within six months of assignment.
- c. On-The-Job-Training with Supervision --

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to provide continuous educational assistance to facilitate professional growth and refinement of project management competencies.

All members will provide through, their interaction, cooperative and mutual professional growth assistance.

d. Formal Educational -- to stimulate and support active participation in formal courses, seminars, institutes and other efforts designed to improve the knowledge base and quality of project management competencies. This component will be available to all personnel after completion of the Basic Management Skills Workshop and active assignment on the management level of Project Director for more than period of six months.

e. Refresher Seminar -- to provide up-dating and up-grading training of project management competencies. All support personnel under the project management system will participate in an annual refresher seminar.

f. Expansion Seminar -- to provide for the broadening of management competencies by focusing on relevant management tools and techniques which are emerging and pertinent to the management system. Participation will be on a need-to-know basis.

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2. Training Resources

- a. The Director of Research, Planning, and Evaluation will be responsible for the training efforts under the Project Management System in the Trenton Public Schools.
- b. Project Management System personnel and consultants will be employed to conduct training efforts.
- c. The Trenton Public Schools system will support all training efforts and requirements as described in school policies.

3. Training Evaluation

- a. All training efforts will be evaluated to a certain level of training objective attainment.
- b. The Director of Research, Planning, and Evaluation will be responsible for training evaluation.
- c. Training Evaluation reports will be distributed to participants, a summary forwarded to the Office of the Superintendent and his Assistants, and a copy placed in participants file.

IX Procedures for Handbook Revision

Purpose

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The Handbook is to be a viable and functional guide to Project Management System operation and must be flexible and relevant to current system operation requirements.

Procedure

The Handbook will be reviewed annually. Improvements, suggestions, and recommendations from all administrative levels within the school system and particularly within the Project Management System will be accepted at any time by the Director of Research, Planning, and Evaluation.

An ad hoc committee of the Assistant Superintendent for Curriculum and Instruction, the Assistant to the Superintendent for Administration, and the Director of Research, Planning, and Evaluation, as well as all operating Project Directors will review the handbook.

The above ad hoc committee will prepare its recommendations for the Superintendent. The Superintendent will review recommendations and forward approved recommendations for final Board of Education approval.

All handbook guidelines are approved by the Board of Education and thereafter become Project Management System operational procedures.

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PART III

History of the Project
Management System
Development

PURPOSE:

The purpose of the Project Management System (PMS) is to identify and organize those procedures and techniques useful to the initiation, planning, operation, and termination of special projects being conducted by Trenton Public Schools. Ultimately, the use of such procedures and techniques will improve the performance of special projects and the staff associated with them.

In addition, the Project Management System was designed to supplement and support Trenton's comprehensive planning system -- STEP (System for Trenton's Educational Planning).

BACKGROUND:

In the Spring of 1970, representatives of New Jersey Urban School Development Council, the Trenton Board of Education, and local administrators met to listen to the staff of the Project Management Center, Ohio State University, and discuss programs needed to improve the management of special projects in the school system. This meeting was held in conjunction with Research for Better Schools of Philadelphia.

Out of this meeting came an agreement of Trenton schools and New Jersey Urban School Development Council (NJUSDC) to explore further the design of a program to develop such skills at the local district level. With financial assistance from NJUSDC Trenton schools and Research for Better Schools immediately began to identify strategies which might be appropriate. It was the creation of a new office in the School district -- the Division of Research, Planning, and Evaluation -- which provided the necessary central focus for the development of a comprehensive Project Management System (PMS). In addition to the development of a planning system, the new division acquired the task of developing effective means of unifying information, finance, personnel, training, and evaluation activities among the Trenton projects.

During the months of January-February 1971, the Director of Research,

Planning, and Evaluation met with the staff of Research for Better Schools to design strategies to design and implement a system specifically designed to the system's needs. That plan has resulted in the following activities.

INITIAL EFFORTS:

In order to identify project activities and weaknesses in terms of coordination and operation, the Division of Research, Planning, and Evaluation conducted a project survey in June and July of 1971. The results were analyzed by both local staff and Research for Better Schools. A report of this survey was completed and presented to the superintendent in September of that year.

The survey indicated that project directors or coordinators generally understood their projects and had sufficient professional background in terms of the educational activities. Almost all indicated a need to improve and reinforce their management skills. Many projects also expressed some difficulties in terms of staff relationships, particularly in terms of position in district administrative organizational structure. The project directors also expressed some difficulty in terms of school building relationships.

For the most part, planning was described in a fashion that seemed to be responsive to demands by funding agencies, advisory groups, or other forces. Planning was also isolated -- one project seldomed planned activities with others. In addition, evaluation (a key aspect in planning) was designed sporadically and not designed to evaluate programs.

The project directors indicated a general ability to administrate their charges. However, many indicated a general lack of knowledge about key management techniques such as PERT, Gannt, etc. Projects seemed to have little difficulty in hiring, purchasing, and other standardized activities. One key weakness related to this factor was data collection and analysis. Much fine work in the district is lost because it is not communicated, or even collected.

Reports filed to many outside agencies are not forwarded to key offices in the school district. Similarly, projects did not communicate with each other as well.

As a result of this survey and report, the superintendent adopted the recommendation to appoint the Division of Research, Planning, and Evaluation as a "monitoring agent" for all Trenton projects. As monitoring agent, the division was given the task of establishing a program to tackle these problems.

STAFF TRAINING:

With the superintendents mandate, the Division planned and implemented a series of training sessions to provide project directors with key skills. Both the Educational Program Management Center (Ohio State University) and Research for Better Schools assisted in this effort.

A. Executive Orientation

1. Purpose. The executive orientation session is designed to introduce Board of Education members, senior school administrators; and others to the concept of project, project management and the project management system, the advantages and limitations of a project management system, organizing a project management system in the local school district, and the requirement of such a system.
2. Invited Participants. (a) Board of Education (all members); (b) School Administrators (Superintendent, Assistant Superintendent, Secretary/Business Administrator and assistants, (all Directors of special areas); and (c) Others (Model Cities, United Progress Incorporated, and other related community agencies).
3. Speaker. Dr. Desmond L. Cook (Ph D, State University of Iowa) is Professor of Education and Director of the Educational Program Management Center, College of Education. He is the author of EDUCATIONAL PROJECT MANAGEMENT and PERT: APPLICATIONS IN EDUCATION.
4. Location, Time, and other Specifics.
 - a. November 8, Vocational Conference Room, Trenton Central High School, 9 a.m. to 4 p.m.

B. Basic Principles and Techniques of Project Management

1. Purpose. This 4-day session is designed for the project director in the Trenton school district to cover the major phases of project management: project planning, operational control, and termination.
2. Participants. Personnel of the Trenton Board of Education who have been designated as having responsibility for a special project (see attached listing of projects and their directors).
3. Seminar Leaders. Dr. C. Peter Cummings and Dr. Steven Gyuro of Research for Better Schools, Philadelphia. Both men have had extensive experience in assisting special projects and school systems in the area of PROJECT MANAGEMENT.
4. Location, Time, and other Specifics.
 - a. November 15 and 16, Vocational Conference Room, Trenton Central High School, 9 a.m. to 4 p.m.
 - b. December 7 and 8, Vocational Conference Room, Trenton Central High School, 9 a.m. to 4 p.m.

C. PERT Session

1. Purpose. Introduce participants to the elements of Program Evaluation and Review Techniques (PERT) and their implication to effective educational program activities.
2. Participants. Personnel of the Trenton Board of Education who have been designated as having responsibility for a special project (see attached listing of projects and their Directors).
3. Session Leader. Mr. Sherwood Wilson, Executive Director of Educational Improvement Center, Pitman, New Jersey and leader in management techniques.
4. Location, Time, and other Specifics.

January , 1971, Trenton Central High School, Community Room,
9 a.m. to 1 p.m.

PROJECT DIRECTORY:

One of the most important steps taken was the identification of special projects in the school system. This action established a base line of data about all projects in terms of objectives and funding. This information was compiled and edited into a Project Directory. The Directory served as both a reference document as well as a dissemination publication.

The Directory brought together for the first time all special projects in the district, providing the reader with the project title, director, statement of purpose, funding amount and source, and location. Included were projects funded by the federal, state, and local education agencies as well as Model Cities and United Progress Incorporated funded efforts.

Over three hundred copies were distributed to staff and community in both draft and final form. The document was reviewed and highly praised in the May issue of the Urban Newsletter of the New Jersey School Board Association.

PROJECT HANDBOOK:

One result of the training session was the determination by the project directors that standardized procedures for projects should be established. It was obvious that neither manpower nor time was available. Project directors could only provide minimal time out of the general operation of the project. Similar, the Director of Research, Planning, and Evaluation had only about 10% of his time available due to the commitment of his time by the district to the development of STEP.

Communicating this situation to the superintendent, the Division indicated that the development of any guidelines would be developed on a time available basis. With available manpower, it was pointed out, that the guidelines could be written by June. When funds became available through

the Emergency Employment Act, a research aide was employed and assigned to the Division. One of his prime task became the design, writing, and editing of these guides, which eventually became known as the Project Management Procedures Handbook.

Essential to the Handbook's development was the continued role of Research for Better Schools. Based on their experience with the Harrisburg, Pennsylvania school system, staff from this regional laboratory provided the Trenton planning office with both material and technical assistance, thus enabling a prompt and meaningful document to be produced. In addition, they were instrumental in providing an instructional program of filmstrips and programmed text for project staff.

NEXT STEPS -- 1972-73:

With the Handbook in draft form, the project directors now have a basic format of procedures. Presented to them in June, the handbook was reviewed over the Summer (1972) and again discussed with the project directors in September. At this meeting, comments were collected and discussed. In order to test the procedures and identify others, the Handbook will be used on a pilot basis; that is, the procedures will be followed in order to determine their usefulness.

As part of the procedures, projects have been asked to provide quarterly reports to the superintendent and other key senior administrators. This effort is the first time that such reporting procedures have been implemented. In addition, all directors were asked to complete a one-page information form describing their specific purposes and activities.

Two efforts initiated last year will also continue:

Project Directory. To maintain and update knowledge about Trenton projects, the Directory is in the process of being updated. A concerted effort

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is being made to produce the document in January of 1973. It once again will identify projects by title, director, purpose, funding, and location.

Staff Training. During the past year, changes have occurred in administrative and supervisory posts. In order to develop project management skills, intensive inservice programs were designed in conjunction with Ohio State University. Conducted late October, the program provided an opportunity to the Education Project Management Center staff to once again develop new skills in project directors and key staff. The outcome of these sessions will be evaluated by Research for Better Schools, based on assessments made throughout the four-day period.

SUMMARY:

As a result of this pilot year, a total assessment of the project management system will take place. This assessment will provide the basis for specific recommendations to have the Project Management Procedures Handbook become part of official Board of Education policy.